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This Notice Expires 1 August 1962

STATINTL

PERSONNEL

28 May 1962

REVISED FITNESS REPORT FORM

1. The Fitness Report form has recently been revised to improve its usefulness. The principal changes are a general simplification and the presentation of precisely defined rating standards as a part of the form.

2. The new Fitness Report, Form 45, (copy attached), will be available in supply rooms on or before 1 July 1962 for headquarters use. Previous editions should not be used after that date.

FOR THE DIRECTOR OF CENTRAL INTELLIGENCE:

L. K. WHITE  
Deputy Director  
(Support)

DISTRIBUTION: ALL EMPLOYEES

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## DIRECTIONS FOR COMPLETING FORM 45, FITNESS REPORT

### GENERAL

#### 1. POLICY

It is Organization policy to inform employees of the effectiveness of their work performance. Organization policy also requires that supervisors record at least once each year their opinions and evaluations of the work performance of employees under their jurisdiction. Evaluations will also be made whenever it is necessary or desirable to provide Organization management with information which may be pertinent to future personnel actions affecting these individuals. [REDACTED] outlines policies concerning the requirements for submitting initial, annual, reassignment and special reports, showing the report to the employee and appeals procedure. The Fitness Report, Form 45, is used to record evaluations. However, an evaluation in memorandum form may be substituted for Form 45 for employees in Grades GS-14 and above.

#### 2. SUBMISSION

The Fitness Report will be submitted in duplicate to the Head of the Career Service concerned. The Head of the Career Service will retain one copy and will forward the original to the Office of Personnel.

#### 3. INITIAL REPORT

A Fitness Report will be prepared for each employee as of nine months after his entrance on duty with the Organization. An initial report need not be made when a Fitness Report has already been made for some other purpose within 90 days prior to the due date of the initial report. The initial report is of particular importance in providing a record of the supervisor's evaluation of the employee before the employee has completed his twelve-month trial period. An initial report may be deferred for a period not to exceed 30 days beyond the due date to provide the supervisor with additional time to evaluate an employee who has been under his jurisdiction for less than 90 days.

#### 4. ANNUAL REPORT

A Fitness Report will be prepared annually for each employee, except when a Fitness Report has been made for some other purpose within 90 days prior to the due date of the annual report. An annual report may be deferred until the employee has been under the jurisdiction of the supervisor for 90 days.

### SCHEDULE FOR SUBMISSION OF ANNUAL REPORTS

GRADES	FOR PERIOD ENDING	DUE IN OFFICE OF PERSONNEL	
		FROM HEADQUARTERS	FROM FIELD
GS-1 through GS-5	31 March	30 April	31 May
GS-6 through GS-8	30 June	31 July	31 August
GS-9 through GS-11	30 September	31 October	30 November
GS-12 and GS-13	31 December	31 January	28 February
GS-14 and above	31 March	30 April	31 May

#### 5. REASSIGNMENT REPORT

Supervisors will prepare a Fitness Report when the supervisor is changed by the reassignment of the employee or the super-

visor. When the supervisor is reassigned and has numerous reassignment reports to prepare he needs to complete only Section B of the report.

## DIRECTIONS FOR COMPLETING FORM 45, FITNESS REPORT

### SECTION A — GENERAL

The items of this section should be completed by the appropriate administrative or personnel officer. Special instructions for completing or omitting items of this part of the report should be carefully observed on Field Transmittal — Fitness Report, Form 45a.

### SECTION B — EVALUATION OF PERFORMANCE OF SPECIFIC DUTIES AND OF OVERALL PERFORMANCE

#### Rating Scale

The rating scale as set forth in this section in Form 45, Fitness Report, is to be used to reflect evaluation of Specific Duties and of Overall Performance. In making your selection of the adjective evaluation for Section B and in completion of the narrative in Section C the following factors should be considered as appropriate:

Cost Consciousness  
Security Consciousness  
Ability to Think Clearly  
Supervisory Effectiveness  
Acceptance of Responsibility  
Foreign Language Competence  
Effectiveness of Oral Expression  
Effectiveness of Written Expression

Mobility  
Initiative  
Versatility  
Productivity  
Decisiveness  
Resourcefulness  
Cooperativeness  
Records Discipline

#### Rating of Performance of Specific Duties

In this section the supervisor will list in order of importance the most significant duties the employee has performed during the rating period. Each duty shall be described in sufficient detail to provide information which may be useful later in considering individuals for other assignments. Your evaluation should be recorded by entering the appropriate letter in the box provided for your evaluation of each duty.

#### Rating of Overall Performance in Current Position

In making this rating the supervisor should take into account the employee's conduct on the job as well as his performance on all specific duties. Each supervisor will weigh these factors in his own mind so as to arrive at a rating which will reflect an employee's overall value on the job.

### SECTION C — NARRATIVE COMMENTS

In this section the supervisor describes the employee's demonstrated abilities or deficiencies in the performance of his present job. This may include comments regarding a specific duty by direct reference to that duty. Any relatively high or low

ratings in Section B should be explained or amplified by supporting statements. In addition, the supervisor may comment here on any extenuating circumstances which affect the productivity and effectiveness of the employee. Comment should be made on the relative performance of the person being rated with other people known to the rater doing comparable work. In commenting on the manner of performance of managerial or supervisory responsibilities, abilities and skills in such as the following should be considered:

#### Delegation of responsibility

Establishment and maintenance of clear lines of authority  
Use of personnel, space, equipment, funds, etc.  
Formulation and coordination of programs  
Developing teamwork

In completing the ratings on Career-Provisional employees comment should be made on the intent, capability and desire of the individual to fulfill the service obligations of the Career Service to which he is assigned.

### SECTION D — CERTIFICATION AND COMMENTS

The person being rated may attach to his fitness report a memorandum concerning any part of the report. The memorandum will be attached to the original for inclusion in the Official Personnel Folder.

Reviewing officials are responsible for assuring that all reports made by rating officials under their jurisdiction are consistent and reflect uniform standards of reporting. Through the counseling and supervision of rating officials, reviewing officials can play a major role in improving the operation of the Fitness Report program.

In addition, reviewing officials should as a matter of practice submit a brief narrative evaluation of the performance and potential of the individual being rated, noting the degree to which he is personally familiar with the individual and his work. Even though the reviewing official may not be able to evaluate the individual from firsthand experience with him, it is likely that the reviewing official may be able to contribute useful information concerning future utilization or training of the individual based on the review of his record of performance and assignments.

If the reviewing official is in substantial disagreement with the rating official he should state whether or not he has discussed the evaluation with the rating official and the employee.

When a person departs an overseas station without having been shown his Fitness Report, it is incumbent upon the Career Service to have the report shown to the individual.

FITNESS REPORT				EMPLOYEE SERIAL NUMBER	
<b>SECTION A GENERAL</b>					
1. NAME (Last) (First) (Middle)			2. DATE OF BIRTH	3. SEX	4. GRADE 5. SD
6. OFFICIAL POSITION TITLE			7. OFF/DIV/BR OF ASSIGNMENT		8. CURRENT STATION
9. CHECK (X) TYPE OF APPOINTMENT			10. CHECK (X) TYPE OF REPORT		
<input type="checkbox"/> CAREER <input type="checkbox"/> RESERVE <input type="checkbox"/> TEMPORARY <input type="checkbox"/> CAREER-PROVISIONAL (See Instructions - Section C) <input type="checkbox"/> SPECIAL (Specify):			<input type="checkbox"/> INITIAL <input type="checkbox"/> REASSIGNMENT SUPERVISOR <input type="checkbox"/> ANNUAL <input type="checkbox"/> REASSIGNMENT EMPLOYEE <input type="checkbox"/> SPECIAL (Specify):		
11. DATE REPORT DUE IN O.P.			12. REPORTING PERIOD (From- to-)		
<b>SECTION B PERFORMANCE EVALUATION</b>					
<p><b>W - Weak</b> Performance ranges from wholly inadequate to slightly less than satisfactory. A rating in this category requires positive remedial action. The nature of the action could range from counseling, to further training, to placing on probation, to reassignment or to separation. Describe action taken or proposed in Section C.</p> <p><b>A - Adequate</b> Performance meets all requirements. It is entirely satisfactory and is characterized neither by deficiency nor excellence.</p> <p><b>P - Proficient</b> Performance is more than satisfactory. Desired results are being produced in a proficient manner.</p> <p><b>S - Strong</b> Performance is characterized by exceptional proficiency.</p> <p><b>O - Outstanding</b> Performance is so exceptional in relation to requirements of the work and in comparison to the performance of others doing similar work as to warrant special recognition.</p>					
<b>SPECIFIC DUTIES</b>					
List up to six of the most important specific duties performed during the rating period. Insert rating letter which best describes the manner in which employee performs EACH specific duty. Consider ONLY effectiveness in performance of that duty. All employees with supervisory responsibilities MUST be rated on their ability to supervise (indicate number of employees supervised).					RATING LETTER
SPECIFIC DUTY NO. 1					RATING LETTER
SPECIFIC DUTY NO. 2					RATING LETTER
SPECIFIC DUTY NO. 3					RATING LETTER
SPECIFIC DUTY NO. 4					RATING LETTER
SPECIFIC DUTY NO. 5					RATING LETTER
SPECIFIC DUTY NO. 6					RATING LETTER
<b>OVERALL PERFORMANCE IN CURRENT POSITION</b>					
Take into account everything about the employee which influences his effectiveness in his current position such as performance of specific duties, productivity, conduct on job, cooperativeness, pertinent personal traits or habits, and particular limitations or talents. Based on your knowledge of employee's overall performance during the rating period, place the letter in the rating box corresponding to the statement which most accurately reflects his level of performance.					RATING LETTER

**SECTION C**

**NARRATIVE COMMENTS**

Indicate significant strengths or weaknesses demonstrated in current position keeping in proper perspective their relationship to overall performance. State suggestions made for improvement of work performance. Give recommendations for training. Comment on foreign language competence, if required for current position. Amplify or explain ratings given in Section B to provide best basis for determining future personnel action. Manner of performance of managerial or supervisory duties must be described, if applicable.

**SECTION D**

**CERTIFICATION AND COMMENTS**

1. <b>BY EMPLOYEE</b>		
I CERTIFY THAT I HAVE SEEN SECTIONS A, B, AND C OF THIS REPORT		
DATE	SIGNATURE OF EMPLOYEE	
2. <b>BY SUPERVISOR</b>		
MONTHS EMPLOYEE HAS BEEN UNDER MY SUPERVISION	IF THIS REPORT HAS NOT BEEN SHOWN TO EMPLOYEE, GIVE EXPLANATION	
DATE	OFFICIAL TITLE OF SUPERVISOR	TYPED OR PRINTED NAME AND SIGNATURE
3. <b>BY REVIEWING OFFICIAL</b>		
COMMENTS OF REVIEWING OFFICIAL		
DATE	OFFICIAL TITLE OF REVIEWING OFFICIAL	TYPED OR PRINTED NAME AND SIGNATURE

## OVERALL PERFORMANCE

<u>RATING</u>	<u>DESCRIPTION</u>	<u>EXPLANATION</u>
1.	Performance fails to meet basic requirements.	Performance is clearly not acceptable. A person receiving this rating will be considered for separation, change to lower grade or reassignment.
2.	Performance satisfies most basic requirements. Improvement desirable in some areas.	The overall performance meets the requirements of the position. Performance in some areas is marginally satisfactory and this rating indicates that improvement is required either through on the job experience or additional training. Details should be brought out in the narrative.
3.	Performance is competent and effective and clearly satisfies all basic requirements.	Assignment of this rating indicates that the employee is producing desired results in a proficient manner.
4.	Performance is very satisfactory and clearly exceeds most basic requirements.	Performance shows substantial mastery of all elements of the position. Employee is considered unusually proficient in performing the duties of the position.

JOB NO. \_\_\_\_\_ BOX NO. \_\_\_\_\_ FILE NO. \_\_\_\_\_ DOC. NO. 3 NO CHANGE  
 IN CLASS/ (DECLASS) ☒ CLASS CHANGED TO: T E C RET. JUST. \_\_\_\_\_  
 NEXT REV DATE \_\_\_\_\_ REV DATE 10/78 REPIETER 078991 DATE DOC. 30  
 NO. PGS 3 CREATION DATE \_\_\_\_\_ ORG CODE 220132 CAG CLASS 1  
 REV CLASS 1 REV COORD. \_\_\_\_\_ AUTH: HR 78-3

<u>RATING</u>	<u>DESCRIPTION</u>	<u>EXPLANATION</u>
5.	Performance is outstanding in every respect and is equalled by only a few others known to the rater.	Performance is so exceptional in comparison to basic requirements that employee is acknowledged unquestionably to warrant special recognition.

c.

Definitions of performance ratings for evaluation of specific duties.

RATING

DEFINITION

1. Weak  
Performance ranges from wholly inadequate to borderline or marginally satisfactory. A rating in this category requires positive remedial action, <sup>the nature of which</sup> depending upon the significance of the specific function to which it is given. The action could range from separation, to change to lower grade, to reassignment or to further training. *Counseling probation*
2. ~~Good~~ Adequate  
*Reassign to increasing order of severity*  
Performance meets all requirements of the duty to which <sup>this rating is</sup> given. It is satisfactory and is neither characterized by deficiency or excellence.
3. Effective  
Performance is more than satisfactory. In the duty rated the employee is producing desired results in a proficient manner.
4. Strong  
This rating signifies that all requirements of this duty are performed with remarkable proficiency.
5. Outstanding  
Performance is so exceptional in relation to requirements of the work and in comparison to the performance of others doing similar work as to warrant special recognition.



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